

Section 1: Community or constituency(ies) to be served by the organization

Since 1969, Somerville Community Corporation (SCC) has served the City of Somerville and its residents. SCC focuses all of its resources on the central question of sustaining affordability and livability for the lower income two thirds of the population, including immigrant communities both new and established.

Somerville is a diverse and divided city of 80,000 residents. An upwardly mobile gentrifying community occupies the Western districts of the city. A significant percentage of its population with incomes below AMI lives primarily in the Eastern half. For decades, Somerville had been home to low income and working class immigrant families, mostly from Ireland, Italy, Greece, Portugal and the Portuguese Azores. While Somerville suffered from disinvestment and physical deterioration that most urban core cities suffered, owners and renters had no issue affording housing due to the stable housing stock. Unfortunately, the beginning of the 1980 saw a change in these markets which coincided with the opening of the MBTA Red Line extension from Harvard Square, Cambridge through Porter and Davis Squares to Alewife. Somerville's housing market and demographics changed rapidly and severely.

By the early 2000s, European immigrants and their descendants, who had previously comprised over 90 percent of Somerville's population, had been reduced to approximately one-third of the city's population. The other two-thirds of Somerville's emerging new population fell into two distinct cohorts: (1) "Gentry" – mostly middle and upper class, well educated, white residents (2) Recent immigrants – but this time mostly people of color coming from Central and South America, the Caribbean, South Asia and Africa, generally with much lower incomes and levels of education. Furthermore, the gentry has found residence overwhelmingly in the Western part of Somerville, while the newer immigrants have found homes in the Eastern half.

In 2007-08, SCC worked with Reconnecting America to produce the "Somerville Equitable Transit-Oriented Development Strategy" report as a first major step to understand the potential impact of the MBTA Green Line Extension in Somerville. Among other findings, the report found that, in the 2000 census, while Somerville, as a whole had a median income **12% below** the regional median, neighborhoods around the Red Line stations were already **6% above** the regional median income, and **21% above** the City median. The attached map showing median household incomes by census tracts from the 2011-2015 American Community Surveys (ACS), developed by longtime SCC Board member Ezra Glenn, shows more recent evidence of this trend toward an economically bifurcated City. The map shows that Somerville has 8 census tracts below \$67,500 median household income, while the 4 wealthiest West Somerville tracts have median household incomes above \$97,000. In fact, the three poorest census tracts in East Somerville have median incomes less than half that of the two wealthiest West Somerville tracts. American Community Surveys data show that 43% of Somerville residents are classified as cost burdened, as they pay more than 35% of their income on housing (1/6 of the population is

considered severely cost burdened, paying over 50% of their income on housing). 10.5% of all residents live below the federal poverty level.

This bifurcation extends into other social indicators as well. Somerville's population is 31% people of color, compared to 25% regionally, and 26.8% of the population is foreign born. In the schools, 51% of the students speak a language other than English at home, compared to 16.7% state wide. Immigrants earn 29.8% less than native born residents. The high school dropout rate is 18.6% in Somerville, compared to 8.2% statewide. At the same time, 52% of Somerville's workforce has a bachelor's degree or higher. 34% of the workforce has a high school degree or less, and are nearly twice as likely (13% vs. 5-8%) to be unemployed than those with a bachelor's degree or higher. In summary, Somerville's diverse population reflects two ends of a workforce spectrum, with low income and immigrant workers either under-employed, or working in low paying jobs, while a significant portion of the population is highly educated and eligible for higher paid positions.

The City of Somerville faces unprecedented transformation in the next 2 decades, which presents potential opportunity to Somerville's residents if managed well. In 2012, the City adopted its comprehensive SomerVision plan. This plan predicts that the next 20 years will bring 30,000 new jobs, 6000 new housing units (1200 of them permanently affordable), and 125 new acres of publicly available open space. The Metropolitan Area Planning Council projects 74% job growth in Somerville, compared to 8% growth in the region. Planners also anticipate 10 million square feet of new commercial and residential development. The \$2.3 Billion Green Line Extension will add 4 light rail stations in Somerville and 2 stations on the city's border. Assembly Square has already added 450 units of new housing, over 500,000 square feet of retail and office space, a new Orange Line MBTA station, and a new 800,000 square foot Partners Health Care administrative office building. 569 housing units and a new hotel are currently under construction. More than 1000 additional housing units, over 2 million square feet of office space, and over 500,000 square feet of additional retail space will be added over the next 5-10 years.

While SCC aims to benefit the entire community through its community development model, its most important work connects directly with the members of the community most at risk. SCC works with community members and partners to address today's critical issues of equity in the face of the tremendous transformation across a city- and a region. SCC board, staff, and overall membership have vigilantly concentrated their work to counteract market-driven displacement pressures. As a result of the seismic changes described above and in anticipation of continuing transformation, SCC adheres to the following intended impact statement, adopted by the SCC Board in 2008:

Building community power and organizational resources so that low- and moderate-income people and new immigrants continue to have the opportunity to reside in, be full participants and become leaders in the Somerville community.

Section 2: Involvement of community residents and stakeholders

SCC is a membership-based organization with nearly 400 formal members, and 1500 constituents. While we are proud of our membership base, it is the level of activity and commitment for which we carry the most pride. Since 2001, SCC has strongly rooted itself in

grassroots community *organizing* practice. This resulted in a number of successful campaigns to influence affordable housing policy and bring about neighborhood quality of life improvements. Since 2005, SCC has built a strong practice of participatory community *planning*, beginning with our East Somerville Initiative. This continued with the Community Corridor Planning project along the pathway of the anticipated MBTA Green Line Extension. Over the last 3 years, SCC has extended this practice to help resident influence the City's planning in the eastern portion of Union Square, and is currently working with our partners in the redesign of the 5.5 acre Clarendon public housing site.

As a result of community organizing and planning work, SCC enjoys a robust membership, which participates across a range of issue-based committees, community planning steering committees, and neighborhood land use planning groups. SCC's annual meetings routinely draw approximately 250 members. Its annual summer member meeting gathers together approximately 100 members to participate in a range of workshops and whole group sessions. A base of 60 active leaders participate on a regular basis in core committees and actions, and SCC has the capacity to quickly mobilize 75-100 members on important issues in Somerville. For example, in late 2015, 100 residents attended a public hearing on the proposed increase in Inclusionary Housing, with over 30 testifying in favor.

In 2008 SCC launched the Leadership Development Institute, an intensive 4 half-day training program for 20 emerging community leaders. Each year since, the program has trained 20-25 new leaders. In addition, each year SCC sponsors 4-5 one-time leadership development workshops on topics ranging from public speaking to understanding economic injustice. Several years ago SCC developed a model connecting clients from economic opportunity programs to SCC's organizing and leadership building work. This model has remained, and expanded to include the First Source jobs program. Additionally, SCC leads the region in conducting simultaneous interpretation in 4 languages (Spanish, Portuguese, Haitian Kreyol and English). This model allows every participant to speak in their first language by wearing headsets equipped to translate.

Leadership development drives much of SCC's work, and is critical to successfully preventing displacement in Somerville. Our approach is creative and we implement a variety of strategies to inspire people to engage with our work. The first step involves crossing barriers to reach people who usually do not or cannot get involved through door knocking and personal one to one visits. Staff, interns and volunteers make an effort to match visits by language. All meetings provide child-care, food, and language interpretation, ideally simultaneous. SCC's culture emphasizes the importance of building relationships between members, and encourages people to share their personal stories.

Change requires more than simply engage people to participate; SCC's goal is to support the city's most disenfranchised residents to become leaders who shape and guide their equity agenda. These leaders emerge from those who become active on issues committees and campaigns (jobs, housing, and Union United). The organizing and planning team works with these emerging leaders to stretch beyond their comfort zone and develop new skills. These skills include making public testimony, turning out people to events, engaging in power analyses, analyzing relevant data, contacting public officials, and creating actions to move an agenda

forward. As leaders become stronger, they take on organizational roles of leadership, such as becoming a co-chair of a committee, joining SCC Board of Directors, or teaching leadership skills in workshops and trainings.

The net result of SCC's consistent focus on membership and leadership has paid off, as it doesn't have to look far when seeking active input to establish the key goals of SCC's strategic plan. Furthermore, SCC extends this participatory and relational model to a wide range of stakeholder groups. As an actively collaborative organization, SCC enjoys the participation and support from a wide range of partner stakeholder organizations, ranging from local organizations such as the Somerville Homeless Coalition, the Somerville Center for Adult Learning Experience (SCALE), and Groundwork Somerville (among others), to regional organizations such as the Metropolitan Area Planning Council (MAPC), Mass. Smart Growth Alliance and Career Place and Career Source, the Metro North region's two career centers.

Section 3: Plan goals

Somerville Community Corporation completed a three-year strategic plan to cover the period between 2014-2017. SCC will work with a consultant in 2017 to lead the organization through a strategic planning process that will result in SCC's next 3 year strategic plan to cover the period from 2018 through 2021. The goals included in this CIP reflect the current strategic plan, with modified projected outcomes for the next 3 years.

The City of Somerville is undergoing tremendous transformation (as described in Section 1). SCC's overarching goal is to contribute to and influence this transformation to leave intact Somerville's socio-economically diverse population. We are eager to work with our constituents, the City of Somerville, and other partners and allies to solve the underlying public policy question: can a city undergo significant land use and economic transformation, with the infusion of billions of dollars of public and private investment, in a way that benefits people of all incomes without leading to a demographic shift that hurts low income families? SCC's core work, as defined through its current Strategic Plan, sets out to find positive solutions to this question. The Strategic Plan includes the following five goals:

- Goal #1: Increase the amount and stabilize the stock of affordable, family sized rental and homeownership housing in Somerville.
- Goal #2: Create and support initiatives that enhance the economic well-being of low and moderate income Somerville residents.
- Goal #3: Magnify, sharpen, and expand SCC's impact on areas of the city most prone to change, to result in more equitable outcomes.
- Goal #4: Expand SCC's Membership Base and invest in the development of its leaders and in the community.
- Goal #5: Broaden and strengthen SCC's operations, internal policies, and financial position in order to support and facilitate SCC's achievement of its intended impact.

The goals included in SCC's strategic plan address SCC's overarching mission to make sure people of all incomes can afford to live in Somerville in the midst of an increasingly hot market.

Recent data reports from the 2015 Somerville Housing Needs Assessment underscore this current issue. Market rents for 2BR apartments averaged \$2567 city wide based on current listings on MLS. The affordable rent for 2BR apartments would be \$2,439 for households at 110 % AMI (affordable median income), \$1,568 at 80% AMI, and \$665 at 30% AMI. 73.8% of Somerville renters have a median income below what they need to live affordably at market rent. Similarly, home ownership is out of reach for the majority of residents. The mean household income for owners in Somerville is \$87,295. The mean condo cost in 2015 averaged \$593,479 requiring a household income of \$170,000. 82.5% of Somerville's households are below this level. Meanwhile, the development of market and luxury housing is quickly outpacing that of affordable housing. Of the special permits issued for 1900 units since 2009, only 306 will be affordable (including over 100 for SCC's purpose built housing). Anecdotally, SCC has a waiting list of 2200 people for its fully occupied 219 affordable apartments.

Meanwhile, there is a clear demand for jobs, as demonstrated by the popularity of our First Source Jobs program. While the City of Somerville projects an increase of 30,000 new jobs by 2030, a portion of the population facing barriers to employment will not benefit from these opportunities without an aggressive plan to train, support, and coach these residents.

SCC's Goal # 1 - to preserve and produce affordable housing, both through its own work and by influencing municipal policies that result in more affordable housing - is a fundamental means of helping low income families live in Somerville. At the same time, through Goal # 2, SCC helps low income residents to become financially stable, build assets, and access good jobs. By working on both angles of this financial picture, the goal is to help insure that people of lower economic means have viable opportunities to live in Somerville. Goal # 3 directs SCC to pay close attention to neighborhoods of Somerville most prone to change, as these are the areas where low income residents are most at risk. Our Goal # 4, to engage a growing body of members and leaders - with a particular emphasis on lower income residents, immigrants, and people of color- is an effective means of lifting up the importance of the first two goals city-wide, and to further strengthen a diverse and vibrant community by encouraging people to take an active role and voice in what happens. Finally, Goal # 5 guides SCC to increase our capacity and impact for the purpose of attaining our larger mission to ensure people of all incomes can live and thrive in Somerville.

Each of these goals also benefits the whole community. Through over 10 years of community planning and engagement, as well as through the City's comprehensive planning process, community members have consistently prioritized diversity as a core value in Somerville, with access to affordable housing and good jobs as high priorities. If SCC is able to attain its stated goals, we will address community priorities expressed broadly by residents. Because SCC is dedicated to a grassroots approach of working with community members through organizing, establishing peer networks, and broad community relationships, the outcome of our work promises to directly reflect the ideas and values expressed by the community, which is an important benefit to the whole community. SCC has a 47 year track record of working within Somerville, and is uniquely able to effectively connect all sectors of the population to deliver our work in a way that gets us closer to our desired goals and outcomes.

Section 4: Activities to be undertaken

Goal #1: Increase the amount and stabilize the stock of affordable, family sized rental and homeownership housing in Somerville.

For this goal, the following actions will impact Somerville, particularly the low income community, by raising necessary capital to acquire and develop affordable housing, establishing new city policies resulting in a higher number of both family and individual units for low and moderate income residents, and preserving existing affordable housing for renters and owners.

1. Develop partnerships with other quality developers (for-profit and non-profit) to enable SCC to increase acquisition, financing, and production of affordable housing in Somerville.
2. Continue the 100 Homes Program, with the support of Mass. Housing Investment Corporation and the City of Somerville, to acquire at least 25 units per year in existing properties for the purpose of making them permanently affordable.
3. Establish permanent and working capital for acquisition and to leverage favorable borrowing terms.
4. Acquire expiring use properties, or work with tenants to encourage landlords to renew expiring use contracts.
5. Participate with partnering agencies to establish stronger organized tenant networks.
6. Organize and create policies that promote affordability for private and public disposition properties, as well as new development, especially focusing on family-sized units, and deeper affordability.
7. Cultivate additional new sources of funding support for affordable housing, such as through the Community Preservation Act, adopted in 2012.

Outcomes Over 3 Years
<ul style="list-style-type: none">• 110 units (rental + ownership) of new production, mixed income affordable housing plus commercial• 75 units of protected affordable housing through acquisition and recycling of small properties• Adopt a real estate transfer fee, through State home rule petition, generating a new source of millions of dollars annually for affordable housing• Legislature approves "Right of Purchase" legislation that would enable tenants to buy properties at point of condo conversion• Organized base of tenants and minimized rent increases and displacement in private housing• Reach 1-2 CBA agreements with developers that create additional affordability goals/requirements for housing development• Assembled \$1.5 million for real estate reserve fund• Zero loss of expiring use housing, as well as protection of informal affordable housing and tenant rights in properties considered for condo conversion

- City policy established to require at least 25% of disposition of public properties for housing be dedicated affordable
- Increase dollars going to Somerville Affordable Housing Trust by at least \$1 Million per year, through means such as an increase in the City's Linkage Fee
- At least 20% of the anticipated 1000 new housing units are affordable, in accordance with the SomerVision goal
- In partnership with the Somerville Housing Authority, Preservation of Affordable Housing, and Gate Residential, rebuild as new the 216 public housing units at Clarendon Hill, currently in disrepair, as well as add 50 units of restricted middle income affordable housing and approximately 300 units of market rate housing.

Goal #2: Create and support initiatives that enhance the economic well-being of low and moderate income Somerville residents.

For this goal, the following actions will enable Somerville low and moderate income residents to improve their financial stability and have access to jobs locally, which in turn will help stabilize this sector of the community in Somerville. With more resources, shorter commute time, and better financial management, residents will have more opportunity to enjoy their family, community, and local economy.

1. City adopts Job Linkage Ordinance creating a Jobs Trust Fund and Linkage Fee sufficient to support the needs of local workers for training and connections to jobs in Somerville. Jobs Linkage was approved as a home rule petition by the State Legislature in 2016.
2. Support both local and regional efforts to support increasing hiring requirements for women, minority, and local workers
3. Sharpen the scope and impact of SCC's First Source program to connect workers with training and "good" job opportunities by gaining commitments from employers, implementing a tool to measure and evaluate client progress, and partner with others along the full workforce development spectrum
4. Build relationships with and identify opportunities to support small businesses, particularly those run by or providing decent jobs for our target constituents
5. Support Somerville residents who are at financial risk of displacement in increasing their financial stability through financial literacy classes, First Time Home Buyer program, Individual Development Accounts, and ongoing coaching
6. Support financial self-sufficiency efforts of public housing residents with SCC's Economic Opportunity programs through programs such as our Mass. LEAP contract with Somerville Housing Authority

Outcomes Over 3 Years

- City of Somerville enacts the Jobs Linkage Fee and Trust Fund; Jobs Linkage Fee starts at \$1.40 per square foot, and is adjusted to reflect new Nexus Study recommendations, resulting in at least \$800,000 contributed to Jobs Trust Fund
- City of Somerville creates a line item in city budget for workforce development activities; at least \$200,000 per year up to over \$500,000 per year
- 15-20% of new jobs in Somerville go to Somerville residents, with long term goal of 30%
- 10% of new jobs in Somerville go to women and minority workers
- Regional employers, such as the new Wynn Casino and MassDOT GLX contractors, commit to increase hiring goals for women (15%), minority (30%) and local workers
- First Source Jobs Cohort Pilot of 50 participants in 2017, with 50% placed into jobs and/or advanced training programs. Evaluate, adjust and expand program in 2018-19
- Core First Source program services reach 100-150 participants per year, in addition to those in the Cohort model, placing 50% into jobs or advanced training programs
- Establish clear plan for how to scale FS program, along with local workforce partners, to reach more people in our target population of low and moderate income residents
- Serve 1200 clients through financial literacy classes, FTHB, IDA, and financial coaching
- Establish tool to track improved financial circumstances, such as increased income; goal to demonstrate measurable improvement for 75% of financial coaching participants
- 480 people improve their household finances, as measured by creation of realistic household budget
- 900 people self-report a significant improvement in their understanding of the steps in home buying and feel more prepared to buy a home after participating in FTHB Seminar
- 150 people self-report an improvement in their understanding of basic financial literacy in post-class evaluations

Goal #3: Magnify, sharpen, and expand SCC's impact on areas of the city most prone to change, to result in more equitable outcomes.

These actions direct SCC to invest in strategies that have a targeted focus on the parts of the city where risk of displacement for vulnerable populations is high. Because of the pace of activity, it is easy to play a reactive role as private and public sectors move quickly to transform and develop the land; these actions give SCC direct mechanisms for acting proactively, and gaining a seat at the table to directly influence the ways in which these areas change.

1. Execute community plan and vision, with clear role for SCC, in neighborhoods most prone to change to serve as a guide for future years.
2. Partner with private developers and other organizations to build value-added projects.
3. Organize to engage our constituents in city zoning and planning processes and decisions.
4. Establish community benefits agreements among community, City, and private developers/employers, for such things as local jobs, affordable housing, and green space.

5. Explore opportunities to support local small businesses through means, such as mixed use development, incubator space development and local business occupancy preferences.
6. Target neighbors to engage in participatory land use planning related to SCC's property development.
7. Pursue site acquisition opportunities in target areas.

Outcomes
<ul style="list-style-type: none"> • 80% of SCC's new development will take place in areas most prone to change • In city transformation and revitalization districts, zoning allows for higher affordability than the 20% citywide requirement • SCC works with community members to create, approve, and begin implementing an organizational vision and plan, and SCC's role within the plan, to work in areas prone to change • SCC works with City and private developers/employers to establish, implement, and monitor, at least one CBA • SCC develops a plan, based on capacity and need, for the best mix of strategies to assist and protect locally owned small businesses in changing commercial areas • SCC engages 75-100 community residents in land use planning workshops and meetings in areas prone to change, such as East Somerville and the GLX corridor, ensuring that City plans reflect community recommendations • SCC acquires at least 2 new large scale properties in targeted areas, such as 35 Charlestown Street, or 163 Glen Street to redevelop as affordable housing

Goal #4: Expand our Membership Base and invest in the development of leaders in SCC and in the community.

Goal #5: Broaden and strengthen SCC's operations, internal policies, and financial position in order to support and facilitate SCC's achievement of its intended impact.

Goals #4 and #5 are intended to strengthen the way in which SCC works internally and with its ever growing base of members and leaders. If we are successful in building our capacity, which includes a strong and diverse base of members who lead the organization, as well as the financial and staff capacity, we will move more swiftly toward achieving our intended impact. To do this well, we will invest in building leaders, improving our cultural competency, communicating our message broadly, and raising the capital we need for staff, development, and resources. The following actions will move us in this direction:

1. Continue to run the Leadership Development Institute, including both Leadership Basics module (4 half day sessions), 8 sessions as part of our new First Source Cohort Pilot and 2-4 one-time workshops per year.
2. Establish clear pathways for volunteers to lend their skills and help.
3. Increase base of members and active leaders; redesign our methods and practices for membership engagement.

4. Invest in popular education tools, data, and technology to deepen means of involvement and analysis to inform ongoing work and goals.
5. Encourage SCC tenants to become active leaders and to participate in other SCC programs.
6. Design and carry out a financial plan for SCC to be a thriving organization, including institutionalizing a donor development program, developing real estate capital funds, and broadening the base of public and private grants and contracts.
7. Refine and extend our communications work by expanding SCC's public profile and visibility.
8. Update and review organizational operations, policies and procedures, including organizational policies and protocols for achieving, practicing, and maintaining diversity and cultural competency.
9. Develop clear system and protocols to establish and continually review impact assessment of SCC's work and progress towards meeting goals in Strategic Plan.
10. Develop a system of criteria to be used to guide organizational decisions, such as real estate development, new program work, and general equity standards.

Outcomes For 3 Year Period

- 60 people graduate from LDI Basics plus FS Cohort participation (50 per year); 100+ people participate in supplementary LDI workshops
- 10 new core leaders plus 10 continued per year; 70 active leaders (20 new plus 50 continued) per year; 900 engaged participants per year
- Increase formal membership to 600
- Engage 1000 constituents per year through SCC organizing, activities, and events
- Increase active leadership base (leaders who are actively involved in campaigns and committees) from 60 to 100 people per year
- 30% of SCC tenants participate in SCC activities
- Financial plan created, adopted, and implemented, including an increase of at least \$500,000 in working capital
- SCC's brand and mission more widely recognized as a result of updated website, collateral, use of social media, and other marketing approaches
- Demographic make-up of staff and board reflects SCC's target constituency
- Establish data practices and tracking system/dashboard that measures our progress toward our impact goals in a way that is continuously updated and dynamic
- Conduct a new 3-5-year strategic planning process during 2017
- Hire new Director of Finance spring 2017 to replace SCC's long-time (15 years) Business Manager who is retiring
- Raise \$300,000 per year through CITC/Social Equity Campaign; raise additional \$50,000 per year through other donor streams; procure at least \$400,000 per year through grants

Section 5: How success will be measured and/or evaluated

SCC has launched a new Salesforce database system. As we custom design this system over the next couple of years, we will proactively connect our data collection with our vision of impact. We will also assert and test a list of propositions for how to achieve our desired impact, and will use our database to help us track, analyze, and evaluate over time. We hope to establish a dashboard of prioritized goals gleaned from these analytics. Examples of data we intend to collect include:

- Level of participation across all parts of the organization
- Leadership development and growth across leadership categories
- Outcomes achieved resulting from key inputs (for example, job placement, job retention, and career advancement after participation in key First Source Jobs programming; organizing campaign results resulting from leadership development; financial stability resulting from participation in financial literacy programming, etc.)
- Property acquisition
- Donor history by specific fundraising campaigns
- Housing demand for SCC and other affordable housing properties in Somerville

In addition to tracking our data through the Salesforce data base, SCC relies on conducting in-person evaluations to better understand and assess our work, and how to modify it moving forward. This happens regularly at the end of all workshops, classes and events (both orally and written). We also will use our Strategic Plan to evaluate our progress towards reaching the stated goals and outcomes, in order to better understand our priorities and direct our work moving forward. This evaluation takes place with staff, board and organizational members. Finally, an important part of our work is to be part of regional and national conversations to study and reflect on various strategies to addressing similar questions of gentrification and displacement. Through conferences, workshops, and study groups, we are able to reflect on our own work, as well as to glean new ideas that help inform our approach as we move forward.

SCC regularly engages students from area universities to conduct research to help inform and further our work. This can be everything from tracking the housing market, to creating an inventory of properties prone to market change, to assessing gentrification pressures on the Somerville community. This body of research and analysis helps us better understand the challenges and opportunities, and to help answer questions facing SCC and its membership. We also employ a popular education approach to connecting our leaders with data through workshops, data collection, and interactive mapping. In this way, members from all backgrounds have an opportunity to study and respond to the data with staff in a way that helps inform and refine the direction of work, and therefore brings us closer to realizing the goals that are of highest priority to our constituents.

Section 6: Collaborative efforts to support implementation

SCC has a deserved reputation as a collaborative organization, as well as a leader of collaborative efforts in the community. As an organization we work hard to (a) find those areas related to our Intended Impact of combating displacement pressures and working to sustain a

vibrant, economically diverse community where SCC can play a unique role that is not otherwise better. The areas of (1) affordable housing development and policy; (2) financial asset building for low income households; (3) advocating for jobs and access to jobs for low and moderate income people; and (4) advocating for equitable outcomes in all physical and economic development, programs and policies in Somerville, and (5) grassroots organizing, participatory planning, and leadership development are the five areas where SCC plays a singular and leading role in the community.

SCC's clarity about our own appropriate role(s) in the community helps us to form, lead, and participate in a range of collaborative efforts where the collaborators share a common goal and can divide up roles appropriately. For example, SCC served as the lead organization for the Great Neighborhoods Initiative in Somerville from 2011-2014, a program of the Mass. Smart Growth Alliance. SCC led, convened and served as fiscal conduit for that collaborative, but Groundwork Somerville, the Somerville Transportation Equity Partnership, Somerville Health Agenda, and Friends of the Community Path all played vital roles in the overall Initiative. SCC continues to convene and partner with those same organizations today. Similarly, SCC formed and led a collaborative of several organizations working to establish a "Financial Opportunity Center" in Somerville, including The Career Place, SCALE, The Welcome Project and LIFT. However, SCC is not seeking to replicate the career counseling and job development services provided by The Career Place, nor the adult education, ESOL and GED preparation provided by SCALE. Instead, SCC's model is to provide the services and coordination needed – in this case, comprehensive intake, case management and financial education and counseling – and count on collaborating partners to provide the services they are better equipped to provide.

Our clarity of vision and purpose led SCC to recognize in 2011 that, despite SCC's 25-year track record in homelessness prevention work, the Somerville Homeless Coalition was better equipped to carry on homelessness prevention work into the future. Enabling a transition of some of SCC's work and funding support to the Homeless Coalition would have the additional benefit of freeing up SCC's capacity to further the development of our Asset Building programs, as SCC is the leading, and often the only, organization in Somerville providing those services. SCC maintains a very close referral and working relationship with the Somerville Homeless Coalition to serve Somerville residents needing homelessness prevention assistance, as many residents in need of such services continue to make their way to SCC's door.

Other current collaborative efforts include:

- Participating in a Task Force, convened by Mayor Curtatone, to develop legislation enabling a real estate transfer fee in Somerville to generate more money for affordable housing development and preservation;
- Since 2014, SCC has helped organize and been a member of Union United, a coalition of dozens of organizations and individuals seeking a Community Benefits Agreement in conjunction with the anticipated millions of square feet of new development in Union Square;
- Partnering with Middlesex Community College, sponsor organization for The Career Place and Career Source, the Metro North region's two career centers, for SCC to serve

as a “Local Access Point” for the region’s workforce development system in MCC’s newly proposed 5-year plan;
Working in coalition with a number of Boston area community organizations seeking local, minority and women hiring agreements with Wynn Casinos, and with Suffolk Construction, the general contractor building the Casino complex.

Finally, SCC collaborates in a number of ways on a regional basis, in addition to our local collaboration work. SCC as an organization, as well as through specific staff members, is an active participant in Mass. Association of CDC programs, Mass. Community Bankers Council, the Mass. Smart Growth Alliance’s Great Neighborhoods Initiative, Action! For Regional Equity, and the MIDAS Collaborative, among others.

Section 7: Integration of activities/consistency with community strategy and vision

Through a range of coalitions and networks, SCC consistently seeks to establish and proceed based upon a collective vision of making sure Somerville grows and thrives in a way that is consistent with community values of environmental justice, diversity, affordability, access to good jobs, transportation, and open space. That emphasis has been evident in partnership efforts over the years ranging from the Community Corridor Planning Coalition to the Great Neighborhoods Initiative to the current work of Union United.

Similarly SCC seeks to integrate the work of different parts of our own organization. Several years ago, we established a “From Crisis to Leadership” initiative explicitly designed to integrate the community members coming to SCC seeking financial assistance or coaching with the broader community-wide efforts of our organizing committees on housing, jobs and other issues. The idea is to integrate the work assisting individual people and households with the collective action we take to make improvements across the community. As described earlier, beginning in 2017, we are piloting efforts to bring the multiple services of our financial coaching, First Source workforce assistance, and leadership development training to a single cohort of people, on the theory that multiple forms of assistance and effort with the same people will result in enhanced chances for concrete economic and quality of life improvements for those people.

Finally, in multiple ways, SCC board members, members and staff participate in and integrate with the City of Somerville’s efforts to develop and promote a community-wide vision, and strategies for achieving that vision. SCC was a strong participant in the City’s process that led to the establishment of SomerVision, a 20-year comprehensive plan adopted officially in 2012. Also in 2012, SCC and Mayor Curtatone led the successful campaign to adopt the Community Preservation Act for Somerville. As both the City and SCC recognized that we had to do more on questions of housing affordability and jobs access for low income residents, the Mayor launched the Sustainable Neighborhood Working Group in 2014, again with strong support from and participation from SCC. The work of the SNWG has now led to two Task Forces on which SCC is a leading participant: one to develop a home rule petition enabling a real estate transfer fee in Somerville, and the other to enact a local Jobs Linkage ordinance based on the State home rule petition approved in 2016.

Section 8: Financing strategy

SCC seeks a mix of revenues to support its annual and ongoing operations. Our mix of funding support includes (a) private grants; (b) earned income, principally from real estate development and asset management fees; (c) public contracts and grants – primarily for SCC’s Mediation Program; and (d) corporate and individual contributions. Following a period of financial difficulty in 2007-08, coinciding with the dramatic downturn in the economy, especially for real estate, SCC began a series of measures to establish greater financial stability for the organization:

- Implementing a rigorous and closely managed monthly cash flow projection going out 2-3 years;
- Implementing a board-adopted measure to dedicate 10% of all earned developers fees, beginning July 1, 2008, into a reserve fund;
- Revising our tracking and staff assignments for grant fund raising; and
- Implementing, through attrition and layoff, a reduced staffing level, supportable by our financial projections.

As a result of these measures, and our ongoing efforts to implement them, SCC’s financial condition has steadily improved, and our financial performance has increasingly matched projections. During the period from late 2011 to early 2013 SCC retired \$325,000 in working capital debt, and since 2013 has steadily built up reserves that will reach \$450,000 this spring. Just last week, SCC also secured a \$300,000 Working Capital Line of Credit from Mass. Housing Partnership. Coupled with our own internal Reserve Fund, MHP’s WCLOC will enable SCC to be aggressive in the extremely competitive Somerville real estate market.

Having secured stable funding streams in our other revenue lines, SCC set out in 2014 to grow our donor development operation, taking advantage of the then-new Community Investment Tax Credit in the process. Prior to 2014, SCC had averaged \$40-50,000 annually in donor contributions. In 2014, the first year of CITC, we increased our donor fundraising to \$125,000. In 2015, that total reached \$225,000 and in 2016 we raised \$386,000, utilizing not only our \$150,000 in 2016 CITC credits, but also more than half the carryover CITC credits from 2014-2015!

Our financial strategy for 2017-2019 includes three significant components: (1) having cycled through some recent real estate pipeline, and established enough working capital, we will aggressively pursue the acquisition of several parcels of land for development or redevelopment over the next several years; (2) our Economic Opportunity work in recent years, including First Source, has positioned us well to attract new sources of private investment and public contracts; and (3) sustain and grow our newly developed donor fundraising capacity.

Section 9: History, track record and Sustainable Development

Founded in 1969, Somerville Community Corporation (SCC) is a membership organization with a mission to develop and preserve affordable housing, offer services and programs, and build a

collective voice through community organizing and planning in order to realize a stable, diverse, and affordable community. In its 47-year history, SCC has completed over 20 affordable housing projects, resulting in more than 100 ownership units and 219 rental units. We have helped hundreds of adults and young people gain economic stability through the mediation programs, financial literacy and First Time Homebuyer classes, and the First Source Jobs program. We have mobilized hundreds of residents to win organizing campaigns around affordable housing, jobs, neighborhood equity, and access to city amenities, winning signature campaigns including passing the Community Preservation Act; preserving expiring use buildings; winning increases to the Housing Linkage Fee and advocating for a Jobs Linkage Fee; winning an agreement with MassDOT/MBTA to establish the WIN program to focus on local jobs for GLX construction; and others.

We are about to break ground on a new 11 unit condominium development this spring. Through our 100 Homes program, we have now purchase 20 units in 7 properties in order to turn existing properties into permanently affordable housing. Finally, we convened a Team with POAH and Gate Residential that is now working with the Somerville Housing Authority to redevelop the 216-unit Clarendon public housing development, adding 50 new middle income affordable units and 250-300 new market units as part of the redeveloped site.

Through our planning and organizing work, we have collected close to 1000 signatures to support various campaigns, including over 500 to request due public process to amend the existing Inclusionary Zoning Ordinance, which is under consideration today. A growing body of strong leaders has gained attention and support for our Development without Displacement work, including: the proposed increase to Inclusionary Zoning (mentioned above); a Community Benefits Agreement to be signed in part by the Community; the Jobs Linkage Fee; and other recommendations that have been included in City reports. Our team has also supported and participated in regional campaigns and movements, such as Raise-Up MA “fight for \$15”; the work to promote local, good jobs at Wynn Casino; the Gentrification Learning Community; and the regional work to bring the “Advancing Racial Equity” model to the Northeast.

Meanwhile, our Economic Opportunity work continues to grow. We served approximately 400 people through financial literacy, First Time Homebuyer, MassLEAP, and Individual Development Accounts. We now have grown our talent bank to 300 people in the first two years of the First Source Jobs program, and have made 155 job placements. We integrate our organizing and program approaches by sharing resources between programs and campaigns, offering cross-sector workshops, such as a “workers’ rights” training for FS participants, and encouraging participants from these various areas of work to take part in the other parts of our organization. We have a growing number of Economic Opportunity participants who take part in our Leadership Development Institute and become leaders in our organizing work; and vice versa.

SCC, as well as the City of Somerville overall, is strongly committed to the Commonwealth’s Sustainable Development Principles, and works to put those Principles into action. Principle #2 could well be written as a component of SCC’s mission and strategic plan! As described in this proposal, virtually everything SCC does is wrapped around the central question of equitable sharing of benefits and burdens of development in our community. SCC has been leading, and will continue to lead the call for housing and jobs to reach all segments of the socio-economic

spectrum so that low and moderate income residents can share equally in the benefits of new transit, substantial job creation, and housing opportunities in our vibrant urban community.

With the Green Line Extension coming to Somerville, along with large scale new development at Assembly Square, Inner Belt/Brick Bottom, Union Square and Boynton Yards, it is imperative that we seek equitable outcomes for all residents with respect to housing opportunities, transportation choice, job and small business opportunities, and other community amenities, such as new public open space.

SCC is at the forefront of promoting Inclusionary Housing requirements and Linkage Fees as ways to promote the creation and sustaining of more affordable housing. In 2015-16 we led an effort that resulted in the Board of Aldermen adopting a Zoning Ordinance change increasing the City's Inclusionary Housing requirement from 12.5% affordable to 20%. We have also been leading the effort to give Somerville residents the first and real opportunity to access the thousands of new jobs being created in Somerville, in part resulting in the new Jobs Linkage ordinance currently in front of the Board of Aldermen. Where there are gaps in providing affordable housing or in connecting local residents to job opportunities, SCC seeks to fill those gaps as the City's premiere affordable housing developer and by partnering to provide a job readiness and training service stream.

SCC's real estate development serves as a model for green, energy and water-efficient development. Our Saint Polycarp Village development features a passive green roof on the Phase 1 building – the first in Somerville – as well as solar thermal and solar photovoltaic panels in each of the three phases. In addition, we also implemented a comprehensive storm water management plan on the entire three acre site. Most recently, our project at 181 Washington Street stands out as a signature effort to incorporate sustainable development principles.

The City of Somerville led a community process that resulted in the adoption of SomerVision, a comprehensive 20-year plan for the community. SCC was a strong contributor to the SomerVision plan, and helped organize dozens of residents to participate, including strong representation from the low income and immigrant members of the community who don't typically participate in complex planning processes. SomerVision reflects virtually all the Commonwealth's Sustainable Development Principles, with a special concentration on Equity, Concentrated Development and Mixed Use, Expanding Housing Opportunities, Transportation Choice, and Increasing Job and Business Opportunities.

Somerville, MA

Household Income

